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ABSTRACT

This paper reviews the steps (and subsequent results) that have been and are being taken to harmonize the teaching of management, an area that has been identified as one of the common aspects of the work of information specialists, i.e., archivists, librarians, and information scientists. The activities discussed include: (1) a conference held in Vienna, Austria, in 1983, sponsored by the IFLA Section on Education and Training; (2) development of a core curriculum by a member of the Standing Committee of the IFLA Section on Library Schools in response to the recommendations of a working paper that emerged from the Austrian conference; (3) a request for comments from library schools on the proposed curricula; (4) a 1984 UNESCO sponsored International Symposium on Harmonization of Education and Training Programmes held in Paris; (5) a 1985 conference in Varna, Bulgaria, organized by the IFLA Section on Library Schools; and (6) continuation of work on the core curriculum. An appendix contains a proposed curriculum outline with goals, objectives, eight modules, and a detailed plan for a section on recruitment/selection. (9 references) (CGD)

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Management and its Teaching

The Methodologies of Vienna,1983 and of Varna,1985.

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Management and its Teaching

The Methodologies of Vienna, 1983 and of Varna, 1985

Management has been identified as one of the aspects of the work of information professionals which is common to archivists, librarians, and information scientists. Management is variously defined as getting work done through others, or as using human, financial and physical resources in pursuit of a goal. It consists in planning, organizing, staffing, motivating, and controlling. Whatever else is done by information professionals, some or all of these managerial activities are almost certainly part of their jobs. It is true that recent graduates may not be immediately placed in charge of large establishments requiring highly experienced managers. Few, however, will not need to plan their own activities long or short term, to estimate costs and time required for projects, to organize their own work to take advantage of available resources, to supervise junior staff and motivate them to work to the best of their ability, and to check and evaluate work being done by themselves and others.

As you are already aware, UNESCO has encouraged information professionals to harmonize their educational efforts as far as possible, and the three NGOs; FID, IFLA and ICA, have taken several steps in this direction. As long ago as the 1974 UNESCO/PGI Paris NATIS conference, Professor Peter Havard-Williams discussed the idea of a core curriculum and mentioned management as one of the common areas.[1] The various meetings and initiatives taken since have been well documented, and include the Bellagio meeting of IFLA, FID, and ICA in 1980,[2] the 1980 UNESCO pre-IFLA Conference Seminar on Library Education for Asia in Manila,[3] the meeting in Frankfurt in 1981 of the education sections of the three NGOs,[4] the meeting in October 1984 at UNESCO in Paris at which further plans were laid,[5] and the two meetings in Vienna, 1983 and Varna, 1985, on teaching management.

In this paper, I will discuss the steps that have been taken and are being taken to harmonize the teaching of management.

Once this topic had been identified as fruitful for harmonization, the IFLA Section on Education and Training, then called Library Schools and Other Training Aspects, organized a 2-day conference in Vienna in August 1983 to discuss "Management for the Information Professions: Implications for Education and Training". Representatives of FID's Education and Training Committee and ICA's Committee on Professional Training attended and the Austrian Bundesministerium fur Wissenschaft und Forschung and the Vienna Kammer fur Arbeiter und Angestellte supported the venture. The 22 participants came from thirteen countries. A number of papers were read and time was made available for discussion. Finally, a working paper was prepared which was

accepted in principal by the participants at the meeting.

The first paper, by Dr. Edward Evans of the University of Denver, U.S.A., presented a study of topics covered in 35 American textbooks on management and ranked eighteen topical areas. A revised version of this research was published in Education for Information in 1984.[6] Professor Evan's eighteen topics, in descending order of frequency, were: planning, motivation, delegating/organizing, leadership, decision-making, communication, staffing, creativity/change/innovation, quantitative methods, authority/accountability, history, styles, approaches to management, control/budgeting/fiscal management, accounting, human behaviour, ethical/legal aspects, MIS (management information systems), production/operations control, and marketing. He defined each of these topics and explained their application. A particularly interesting section of the paper, not included in the published version, was Dr. Evans's attempt to determine, using his background knowledge of anthropology, "parallels between what happens in managing an organization and what happens in a hunting and gathering society".[7] Although he acknowledges that drawing such parallels is risky, he was able to show clear relationships between the way organizations are managed in a sophisticated society and the way in which the Cheyenne Indians managed their hunting/gathering society. It may be inferred that the topics he identified as relating to management may be applicable across cultural, political and economic boundaries.

Dr. Patricia Layzell-Ward of Australia and Great Britain examined the qualitative aspects of published literature dealing with management for information professionals. It was her perception that librarians are more concerned with management issues than archivists or information specialists. She isolated a wide variety of aspects of management of concern to people in the various fields, and found that there was emphasis on quantitative and financial aspects. A good deal of the literature was written by librarians rather than by those trained in management. She also found that librarians learned new ideas from the professional press, and frequently explored new techniques such as "quality circles" or PPBS (planned programme budgeting systems).

Professor Paul Wasserman, a well-known management expert who has taught for many years at the College of Library and Information Services at the University of Maryland, investigated the way in which various organizations provided training and education in management for information professionals. He identified many instances of conferences or workshops, but little in-depth education. A two-week course sponsored by UNESCO, growing out of his projects in Maryland in the 1960's was described in some detail.

Dr. Bendik Rugaas of the Universitetsbiblioteket in Oslo discussed cooperation between IFLA, FID, and ICA in the area of education for management. He pointed out that the different aspects of management become more important depending on the various fields as well as on the various countries and cultures in which they are practiced. There is a need for a common core, but there must be flexibility to accommodate the variety of situations and to accommodate new ideas and developments. He stressed the importance of three professional groups joining forces, selling the common core idea to established schools, and encouraging change by moving together toward the idea.

Russell Bowden of the Library Association in London addressed possibilities of future cooperation and pointed to some difficulties in finding acceptance for a common core. He emphasized the need for education, the importance of recognizing regional and special needs, and called for regional conference.

Between each presentation there was ample time for discussion, and many valuable points were brought out. There was general agreement on Dr. Evans's eighteen topics, but there was considerable variation in the importance ascribed to the individual topics. Ethics was emphasized by several participants, and the need to stress responsibility and accountability, not only in management but in the quality and accuracy of information services. Others put emphasis on staffing and inter-personal relations, on management of financial resources, or of management of technology. The need for courses at different levels was discussed, especially since new graduates would not be likely to need the same skills as those experienced professionals called upon to manage large facilities. Some discussion centered on the advisability for information professionals to learn management, as opposed to using skilled managers to manage information organizations. The variety of styles of management, from autocratic to democratic, which might be practiced in different countries or under different circumstances was noted.

The conference culminated in a working paper which was prepared at the conference and agreed upon by the participants. Since it has not been published, I am including it here, as revised by Dr. Patricia Layzell-Ward.

> The FID/ICA/IFLA workshop held in Vienna August 17 and 18, 1983 thinks it is possible and desirable to identify areas of common interest in the teaching of management for the information profession".
>
> The Participants at the workshop believe that now is the time for FID/ICA/IFLA to join forces in working toward an integrated approach to education and training. Furthermore, education and training programmes based on a common core of management topics may be considered a

first important step toward a more united effort from these professions in making their communities aware of the role that archivists, information specialists and librarians play in preserving and providing access to the country's information resources and intellectual heritage.

The workshop sees management for the information professions as being concerned with the following topics which have been divided into two groups - theory and practice.

THEORY	PRACTICE
authority/accountability	accounting
communication	budgeting
creativity/change/innovation	control/evaluation
decision-making	management information systems
delegation	marketing
ethical/legal/political	production and operations (physical plant, security, files and records etc)
history/styles	
human behaviour	quantitative methods
leadership	staffing
motivation	
planning	

The topics were identified on the basis of their treatment in current management textbooks.

One method of incorporating the above topics at the institutional level is to consider offering an introductory course that would bring students from different backgrounds to a common conceptual understanding. The course would include basics of the systems approach, a way of holistic thinking and outlook in addition to the elements of systems analysis. This introductory course would help translate individual approaches to mutually supportive thinking. There could be a synthesis of the topics in a course at the end of the programme of study which could incorporate the basics of information policy: ethical, legal, professional, economic and political issues.

The workshop wishes to emphasize that it will be necessary to be aware that the topics will have to be adapted to:

1) the local cultural, political and institutional setting of a given country or region;

2) the educational system of the country or region;

3) the requirements of the parent institution;

4) the need for programmes at different levels.

The workshop recognizes that the establishment of a common core of management education and training will require further effort to overcome problems e.g. terminological differences and in re-shaping teaching programmes.

RECOMMENDATIONS

1. The FID/ICA/IFLA intensify efforts to work co-operatively towards the goals set out above, especially through the continuation of the FID/ICA/IFLA Working Group on Education and Training.

2. That the regional and international meetings on further harmonization of curricula should be actively supported by FID/ICA/IFLA and sponsored by UNESCO.

3. Where individual programmes do not at present include the teaching of management, the topics listed above to be adopted. In programmes taking an integrated approach the topics might form the common core for management instruction.

In response to these recommendations, the IFLA Section on Library Schools, as it was then called, recommended that a core curriculum be prepared by one of the members of its Standing Committee. I was asked to do this, since I teach management in McGill University's Graduate School of Library and Information Studies. A grant from IFLA was made available for this work, and a preliminary paper was prepared in August 1984 and summarized at the Section's meeting during IFLA's annual conference in Nairobi. The paper described the provenance of the project and summarized the working paper from Vienna. The rationale for teaching management to information professionals was discussed and the literature already available described. An outline of a basic core curriculum was proposed along with a detailed breakdown of one section: on recruitment and selection of staff. Two suggested exercises which could be used in teaching this section were listed in an appendix, and a number of readings were suggested. The proposed curriculum outline and the breakdown of the recruitment/selection section is attached in Appendix I.

In addition to the outline, various methods of teaching management were suggested. A question which was raised was that of the balance between theory and practice. In educating professionals, it is important that they be given a good grounding

professionals, it is important that they be given a good grounding in theory. However, to teach management in theory only does not really prepare the students to manage when they graduate. It is necessary, then, for them to understand the theory, but also to have opportunities and through exercises, role-playing, and case studies to put the theory to test. K.H. Jones (8) and Martha Jane Zachert (9) have insisted on the need for experimental learning and, in my own experience, I have found that students learn to appreciate and understand the theory better when they have real or simulated situations to deal with.

This material was sent to library schools in various countries, and to members of the IFLA Section on Library Schools, the FID/ET, and the ICA Committee on Education for comment. Three questions were asked.

1. Is this, so far, appropriate for all information professionals?

2. The topics being covered are appropriate for North America. Are they valid for the rest of the world?

3. Is the methodology valid for various countries and schools?

Response to this material was sparse, and those that did respond were, on the whole, polite. Many gave constructive criticism which would help me to adapt the proposals for archivsts and information scientists as opposed to librarians, or to make them more applicable for use in schools where the cultural climate differed from my own. Most felt that, in general, the core curriculum could be used in almost any country or group. Many stressed, as I had, the need for flexibility so that the content and methods could be adapted to the actual situation. Some questioned the validity of including suggested methods.

In October, 1984, UNESCO sponsored an International Symposium on Harmonization of Education and Training Programmes in Information Science, Librarianship and Archival Studies in Paris.[5] Once more, management was stressed as one of the areas for harmonization, and the following activities were suggested, and are under way.

1. Preparation of a reader on management topics of common concern to libraries, archives and documentation centres for use in teaching harmonized courses.

2. Undertaking comparative research on management issues. This should focus upon identifying areas of similarity and areas of difference in the management processes and problems of library, documentation and archives services. The results should be used as input for harmonized study programmes.

3. Organization of short advanced courses in management for educators and administrators representing different types of information services. Some courses should be primarily concerned with management of the most recent developments in information handling useful to participants from various branches of the information community.

4. Organization of joint conferences of teachers of management for information professions to be undertaken at international, regional and national levels.

In order to push the harmonization of management further, another two-day conference was organized by the IFLA Section on Library Schools, in June, 1985 in Varna. Eighteen people attended from twelve countries.

Yves Courier, Chief of the Section for Training of Specialists and Users, Division of the General Information Program (PGI/TSU) of UNESCO gave the opening address on "The Objectives for the Teaching of Management in Developing Countries in the context of Harmonization of Curricula for Archives, Libraries and Information Services."

He stressed the difficulties of preparing material which is appropriate for all countries and outlined the four steps proposed by UNESCO in 1984. He stressed that any work done should be precise and specific and must take account of the social/economic/political/cultural environment. Information professionals in each country should be involved in curriculum design, which is difficult to do well. Faculty in schools tend to emphasize theory; practitioners want competent workers. All should be involved in this work.

Discussion centred on the definition of "management" and levels of management, on the way in which experts can assist developing countries by advising, not designing and on their role as resource persons not as decision makers.

Professor Paul Wasserman discussed the difference between management as a program or as a process. The task is to manage people working towards an end, and it is irrelevant whether the end is an information organization, or a hotel or a factory. Good management is the same in any field. In teaching management to information professionals we can use examples from libraries or archives or documentation centres, but the process is the same. He stressed that there are cultural variations which affect management, such as differing reactions to authority. These must be understood.

He discussed the importance of involving practicing professionals in curriculum design, and the need for definition of educational objectives in building programs. He insisted that

management is important even for those who will never manage because, since we spend our lives in complex organizations, we need to understand how they operate. He stressed the importance of different levels of instruction, and felt harmonization of teaching management may be easier at a higher level.

In response to questions about the need for library or archives managers to be librarians or archivists, Professor Wasserman replied that a good manager can manage any organization and that there is less and less need for technical competence as managers rise to higher levels. There was a good deal of discussion on this, most people tending to believe that some technical expertise is indeed necessary. Professor Wasserman said that with as few as 15 employees the manager would be fully occupied in managing.

Michael Cook, Chief of the University Archives, University of Liverpool, and Chair of the ICA/CPT commented on Professor Wasserman's paper, stating that he is not an expert in management, but speaks from a practical point of view. He stated that archives rarely have full time managers but are managed by people who have to be archivists as well. Management is one element in their work, which involves managing people, resources, and money.

He agrees that education and training for librarians and archivists must incorporate management concepts but not necessarily as a separate course, especially for beginners. He would rather incorporate management into everything that is taught. In his view, as people move higher, more management skills are needed so they might better be taught as continuing education. He stresses the importance of collegiality of a team of professionals in making decisions, evaluating, controlling. This is not a good model for a business but may be better for a cultural/educational institution. He feels there is need to redefine the management approach to professional tasks.

He thinks that training implications are of concern to the participants. He sees a value to a core curriculum for all information professionals especially at senior levels, and thinks standards are important. The Non-Governmental Organizations should supply advice and suggest standards.

Temenuga Boncheva, Senior Lecturer of the State Library Institute of Bulgaria spoke on "Teaching Management to Library Workers in Bulgaria." He stated that the harmonization is done by the National Library. Students in the Institute are taught management and may take a three-year extra-mural course at levels from national to local. Courses include methodology of management, organization of the work place, division of labour, and planning and financing buildings. Classes consist of lectures to teach theory, and practical seminars. Audiovisual cards are used, and comparative methods used in Bulgaria and elsewhere are

studied. They use statistics, plans, and standards, simulation, analysis, and tests. Students have an opportunity to take part in practica, and some go abroad. Computer technology is used throughout.

Dr. Stetka Petkova, Deputy Chief of the State Archives Central Board of Bulgaria discussed education for archivists. The training must give archivists knowledge so they can meet the overall objectives of the country and contribute to the knowledge of staff.

Professor Luben Atanassov paid tribute to the fact that at the meeting there are differences of opinion, which shows that people are thinking. He stated that it is most important to have clear definitions. He discussed the importance of decision-making at all levels, and the need for librarians and others to be able to use systematic analysis to make decisions. Librarians must be trained to make decisions not only at the top management level but throughout organization.

I described some research I had done amongst special librarians. To the question "Do you consider management knowledge and skills more, less, or equally important than information knowledge and skills." 52% said "equally", 10% "more", and 38% "less." Many management tasks were identified as essential for new graduates in special libraries. Other research bears out that most information professionals do have to manage within 5 years of graduating from school. I also presented my work on the core curriculum. Participants were broken into four groups and asked to spend 45 minutes discussing it and its future.

Comments were generally positive, and most people thought all sections should be included, to allow instructors to choose what would be appropriate in individual cases, though others thought too much was covered. It was suggested that the objectives for such a course should be clear, so that it would be understood whether students should be at the undergraduate or graduate level or if it was appropriate for continuing education. Bibliographies, reflecting all countries, professional fields, and levels would be valuable. Some people thought that sample case studies and exercises should be included in the document.

It was agreed that I should continue with this project and that Peter Sigmund at ICA should work with me. I have now reached the stage of putting this core curriculum together for probable publication by IFLA in 1988. Preparation is nearly complete, and I expect to write in the autumn. The work will include an outline of the course with a paragraph of explanation for each section. It will also provide a small variety of exercises which can be used or adapted for various situations. This is the most difficult part to make useful, but I hope that the material included can be general enough that it can be used by an

instructor in a setting very different from mine and used as a guide. I am still open to new ideas in this area. Last summer I presented some of my ideas in a conference on education for librarianship in China, and it was well-received, but I do not know if they have tested it, and, if so, with what results.

A valuable resource will be the book of readings which UNESCO expects to publish in the Fall of 1987. This will be useful not only to students, but also to teachers of management, and should include papers from a wide variety of sources.

I have tried to describe to you the procedure that we used in the work on harmonization of the teaching of management. There remain many things to be done, but progress has been made. I look forward to seeing progress in other fields in which the information professionals, archivists, librarians, and information, scientists share common ground.

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APPENDIX I

PROPOSED CURRICULUM OUTLINE

GOAL: The goal of the course is to prepare beginning information professionals to understand the principles of good management and to apply them in organizations.

OBJECTIVES: The student will

1) Understand and explain the concepts of management, especially as they apply to information service.

2) Understand some administrative techniques useful to the manager and put some of them into practice.

3) Be aware of the literature and research of management, especially as they relate to information management, and look critically at it.

4) Understand the need to pursue further studies and training in management.

MODULE 1. INTRODUCTION

a) What is management?
b) Why is management important for information professionals?
c) What do managers do?
d) School of management thought/history/style.

MODULE 2. PLANNING

a) What business are we in? What do we want to be/to do?
b) Assessing the political, social, and economic climate.
c) Assessing available resources.
d) Establishing goals and objectives.
e) Strategy/decision-making.
f) Evaluation.

MODULE 3. ORGANIZATION

a) Organizational design.
b) Organizational behaviour.
c) Authority and accountability.

MODULE 4. STAFFING

a) Job classification and description.
b) Recruitment/selection.
c) Training and development.
d) Performance evaulation.
e) Salary administration.

MODULE 5. LEADING

a) Leadership styles.
b) Motivation.
c) Supervision.
d) Delegation.
e) Communication.
f) Managing change.

MODULE 6. CONTROLLING

a) Budgets.
b) Accounting.
c) Quality control.

MODULE 7. MARKETING

a) Market analysis.
b) Public relations.
c) Advertising.
d) Ethics.
e) Legal and political aspects.

MODULE 8. OPERATIONS

a) Building planning and layout of space.
b) Security.
c) Files and records.

DETAILED PLAN FOR A SECTION ON RECRUITMENT/SELECTION

Recruitment and selection: theoretical aspects
- psychological
- physical/technical
- legal

Sources of Employees
- Schools and universities
- National or local employment agencies
- Other organizations
- General public
- Word-of-mouth

Application Forms

Interviewing
- Psychological factors
- What to look for
- How to interview well

Testing
- Questions
- Skill tests/IQ tests
- Exercises
- Interest/aptitude tests

Reference letters

The job offer
Probation

EXERCISES

READINGS